



**Report to the Commissioners**  
**Area IX Agency on Aging, Flathead County**  
**October 20, 2019**  
**Prepared by Lisa Sheppard, Director**

On the last page are two tables, one for performance measures and one for workload indicators, showing:

FY 2018 actuals  
FY 2019 annual targets  
FY 2019 actuals  
FY 2019 actuals as a percentage of annual targets  
FY 2019 actuals as a percentage of FY 2018 actuals  
FY 2020 actuals to date  
FY 2020 annual targets  
FY 2020 actuals as a percentage of FY 2020 annual targets

**The general target is 25% for FY 2020, July 1, 2019-September 30, 2020**, keeping in mind that some numbers will be unevenly distributed throughout the year, some will lag 30-90 days due to subcontractor billing/reporting and some will change during the end of the fiscal year reconciliation process. Additionally, all clients are counted as “new” in July, which results in total client numbers being substantially above the annual target at the beginning of each fiscal year. This effect diminishes as the year progresses. Some information is not yet available and will be reported in future months. Additional detail may be reported in the program sections below. Numbers highlighted in yellow have been revised since the last report.

**Data to note:**

- We continue to have difficulty pulling accurate reports from the new DPHHS database and are recording information in our own spreadsheets as well to try to capture the data. The State is still working on multiple issues related to both data entry and reporting. Until the problems are corrected, data on the following performance measures/workload indicators may be incomplete:
  - Amount of Client Savings from Benefits Counseling
  - Number of Outreach, Information, Referral Contacts
  - Benefits Counseling Hours of Service
- **Transportation**
  - We provided a record number of rides within Glacier National Park for the season ending in September. Of the 255,000 rides we provided, MDT allowed us to report the 10,030 provided on our commuter buses to and within the Park.
  - Excluding rides within GNP, we provided a total of 632 more rides for the 1<sup>st</sup> quarter of this fiscal year than last, even with the higher proportion of GNP rides this year.
  - Ridership on the fixed and commuter routes continue to greatly exceed the target, which is to be expected during the summer season, and is 6% under target for paratransit/Dial-A-Ride. This is due in part to the changes in fixed route service in Kalispell that make it easier for DAR passengers to ride the fixed route.

- Note: although DAR rides are under target, we have very few trip denials (in September we had none) and we are able to accommodate most of the Premium DAR requests out of Evergreen.
- **Information and Referral/Assistance**
  - **Outreach/Education** efforts continue to target Medicare beneficiaries to connect them with additional benefits.
- **Independent Living Services**
  - The total “units of service” for all services combined continue to be substantially below target. We have now completely worked through the waiting list and put people on service. However, there is an industry-wide shortage of paid caregivers which is preventing us from serving more people and /or providing the appropriate level of service to existing clients. We have raised the rates we pay for services and are working with our home care provider agencies to develop other strategies.
- **Benefits Counseling**
  - The increase in cost savings for clients is related to Medicare Open Enrollment.
- **Ombudsman**
  - We are now fully staffed for the ombudsman program, so cases/consults have increased. However, the program is undergoing major restructuring at the state level and it is unclear how it will operate in the future.

## **AOA Administration**

### ***Budget and Contracts***

- We submitted a revised FY 2020 budget to DPHHS to include the approximately \$159,000 in federal funds to be carried over from FY 2019. We just received the revised contract from DPHHS and will be sending it to Tara for review then Commissioner signature.
- In partnership with the Area VI Agency on Aging, we submitted an application for a new BEC grant from the National Council on Aging (NCOA). If awarded, the grant would cover 9 months beginning January 1, 2020 for a total of \$26,250.
- We have been working with Finance and the auditors on the annual audit as Eagle Transit was chosen for single audit this year.

### ***Building***

- Nothing to report.

### ***HR/Staff Development***

- New I&A staff attended certification training in Helena in October. Existing I&A staff attended recertification training in Missoula in September.
- Eagle Transit staff attended MTA (Bozeman) and MDT (Billings) trainings in September.

## **State/Federal/Legislative Issues**

- Montana Area Agencies on Aging Association (M4A) - M4A advocates for aging services funding and policies that support older Montanans.
  - Lisa will attend the quarterly M4A meeting in Helena, October 28-30.
  - M4A has hired a new Association Director.
  - Lisa participates on two subcommittees that assist the DPHHS State Unit on Aging with contract administration and program improvement: Budget/Funding and Legal Services.
  - M4A is providing input and information to the Children and Families Interim Committee in support of its study of Senior and Long-Term Care.

- National Association of Area Agencies on Aging (n4a) – n4a advocates for funding and policies that support older Americans and enable the aging services network to meet their needs; it provides training and technical assistance to members
  - Legislatively n4a is focused on reauthorization of the Older Americans Act which expires at the end of September.

### **AOA Advisory Council**

- The Council will meet next on November 7, 2019.

### **Outreach/Education/Media/Events**

Note: Transportation related outreach is noted in the Eagle Transit section below.

#### *August 2019*

- 8/5/2019: KGEZ monthly interview, 15,000
- 8/6/2019: Medicare/BEC presentation to LDS Church in Columbia Falls, 20
- 8/9/2019: PSA in Hungry Horse News to recruit Meals on Wheels Drivers in Whitefish and Columbia Falls, 4200
- 8/15/2019: information table and rodeo ticket sales at the Fair, 250
- 8/12-27/2019: multimedia promotion of Medicare 101 Class, 30,000
- 8/27/2019, Medicare 101 Class, 10

#### *September 2019*

- 9/3/2019: KGEZ monthly interview, 15,000
- 9/8/2019: information table at annual Walk to End Alzheimer's at FVCC, 250
- 9/12/2019: information/assistance at annual Community Connect event at Gateway Community Center, 200 (directly assisted 49 people)
- 9/14/2019: information table at NW MT Parkinson's Foundation Hope Conference, 70
- 9/19/2019: promotion of social dining and MOW at Whitefish Community Center board meeting, 10
- 9/21-24/2019: multi-media promotion of Medicare 101 class, 15,000
- 9/24/2019: Medicare 101 Class, 9
- 9/25/2019: spoke at NW MT Care Transitions Coalition meeting, 25
- 9/26/2019: information table at Hungry Horse Community Dinner, 70
- 9/28/2019: Stepping into Safety Event at Fairgrounds (KRH), 80

### **Eagle Transit**

- Montana Department of Transportation (MDT):
  - Annual Transportation Coordination Plan/5311 Application/Capital Request
    - We will begin the TCP process with a survey in November and a public input meeting in December. MDT typically notifies us of our annual 5311 and TransADE allocations in December.
  - Quarterly/annual reporting
    - We submitted the FY 2019 4<sup>th</sup> quarter report in September.
    - We will submit the FY 2020 1<sup>st</sup> quarter report this week.
    - MDT has delegated annual reporting in the National Transit Database (NTD) to grantees. They provided training on the process at the Fall Training Workshop in September. Data entry regarding ridership, vehicles and financials must be completed by October 16<sup>th</sup> for MDT review and sign-off by October 30<sup>th</sup>. We have completed all of our data entry, and it has been approved by MDT.
      - We were advised by the regional FTA director to report the full Glacier rides into the National Transit Database (not just those related

to our commuter). However, MDT refused to allow us to report the rides. Further, an NTD representative at the training confirmed that gate fee collections at GNP to support the transit system are not considered fares (contrary to MDT's position). We continue to research and advocate for the use of FTA 5311 rural transit funds in support of our GNP operations.

- 5-Year Transportation Development Planning Grant

- On 10/8/2019 Lisa, Tom, Commissioner Brodehl and Mike Pence met with GNP Superintendent Jeff Mow, Deputy Superintendent Pete Webster and Chief of Facilities Jim Foster to discuss Flathead County's requirements for continuing as a partner in the Cooperative Agreement in the 2020 season and beyond. Discussions are continuing, but we have not yet reached an agreement.
  - At the national level, Department of Interior representatives have expressed support for our position and the proposal.
- We continue to meet with community leaders and others to gauge interest in and support for an integrated transit system serving Glacier National Park and the surrounding gateway communities. Since the last report:
  - On 9/17/2019 at a public meeting at FVCC, we provided spoken and written comment on our proposal relative to the Going-the-Sun Road Corridor Management Plan Environmental Assessment Report. There were approximately 200 people in attendance. Audience members asked questions about our proposal and we distributed 20 handouts.
  - On 9/30/2019, Tom and Lisa presented to the Whitefish Sustainable Tourism Committee.
  - On 10/6/2019, the Daily Inter Lake ran a front-page article on The Mountain Climber proposal; on October 10<sup>th</sup>, the editorial board published a supportive column.
  - On 10/8/2019, Tom, Lisa and TAC Chair Chuck Wilhoit met with the Whitefish Community Foundation.

- Outreach/Education/Media/Special Events:

- As required by federal regulations, a monthly ad ran in the Daily Inter Lake in August and September.
- See above for outreach related to the integrated transit system proposal since last month's report.

- Operations:

- Staff updated schedules for fall routes/times.

- Staff Development/Training:

- Tom attended the Montana Transit Association (MTA) Fall Business Meeting in September.
  - MTA members voted at the meeting to hold the Spring Conference here in Kalispell.
- Tom and 2 other staff members attended the annual MDT Fall Training Workshop in Billings in September.

- Transportation Advisory Committee (TAC)

- The TAC met on October 3<sup>rd</sup>. The focus of the meeting was the renegotiation of the Cooperative Agreement and the Mountain Climber proposal. Members agreed to submit a letter in support of The Mountain Climber as public comment on the GTSR Corridor Management Plan Environmental Assessment Report. The public comment period has been extended to November 6, 2019. Lisa will draft a letter for the Committee's consideration and

send it out for input via email. Members authorized TAC Chair Chuck Wilhoit to sign and submit the letter.

- Glacier National Park
  - See above for updates regarding the integrated transit system proposal.
  - Total ridership for the 2019 season: 255,000
- Other
  - On October 7<sup>th</sup>, Tom and Lisa participated in a conference call with Government Accountability Office staff to provide follow-up information related to their study of rural transit coordination.

### **Nutrition**

- We distribute nutritional education materials monthly to all home-delivered clients and all senior centers.
- We continue to average 90-100 diners per day at the South Campus.
- We have developed new outreach materials and referral forms related to MOW.

### **I & R/Assistance/Ombudsman/Independent Living Services**

- I&A/Benefits Counseling/BEC:
  - Medicare Open Enrollment runs October 15<sup>th</sup> through December 7<sup>th</sup>.
  - DPHHS is sponsoring a new PSA that is running September 23<sup>rd</sup> through the middle of December.
- Veteran Directed HCBS Program:
  - We fully transitioned the program from Area VI on October 1<sup>st</sup>.
  - There are currently 27 enrolled veterans.
- Independent Living Services:
  - Given the difficulty we are having serving clients due to paid caregiver shortages (see “data to note” above), we are exploring other options including contracting with memory care and assisted living facilities for respite and using funds to provide other types of family caregiver support (like education and training).

**Senior Centers** - A primary AOA focus is outreach to area Senior Centers to build relationships, extend support, and explore new opportunities for partnership.

- Lakeside Chapel plans to resume MOW and social dining services shortly. We are meeting with the new pastor to discuss details later today.
- Whitney submitted the County’s application for a CDBG planning grant related to the Bigfork Community Center.



# October 2019 Report: Performance Measures Tables - September 2019 stats (FY 2020)

25.00%

MEASURE	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018	September	Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
# Receiving Independent Living Services	110	98	98	100%	89%	4	49	53	119	45%
# Receiving Meals on Wheels	374	465	401	86%	107%	23	242	265	465	57%
# Seniors Receiving Congregate Meals	1,404	1,200	1,538	128%	110%	104	712	816	1,200	68%
# Eagle Transit DAR Unduplicated Riders	331	450	333	74%	101%	15	173	188	450	42%
Client Savings from Benefits Counseling	N/A	N/A	N/A	N/A	N/A	\$51,467	\$4,230	\$55,697	\$400,000	14%
% of IL Service Recipients at Moderate to High Risk of Institutionalization	92%	88%	93%	106%	101%	89%	89%	89%	88%	101%
Per Meal Cost of Nutrition Services	\$6.29	\$7.00	\$6.80	97%	108%	\$5.78	\$4.33	\$5.78	\$7.00	83%
% Overall Satisfaction with Nutrition Services from Annual Survey	97%	95%	97%	102%	100%	N/A		0%	97%	0%
% Overall Satisfaction with Independent Living Services from Annual Survey	90%	95%	97%	102%	108%	N/A		0%	90%	0%
Maximum annual number of transportation complaints	12	36	4	11%	33%	1	9	10	25	40%
WORKLOAD INDICATOR	FY 2018 Actuals	FY 2019 Target	FY 2019 Actuals	FY 2019 % of Target	FY 2019 as % FY 2018		Total Last Report	Total/Avg. to Date	FY 2020 Target	% Target
<b>Nutrition</b>						September				
Total Meals	80,639	80,000	78,515	98%	97%	6,795	14,229	21,024	80,000	26%
MOW	47,409		46,658	N/A	N/A	4,014	8,437	12,451		
Social Dining (Congregate)	33,230		31,857	N/A	N/A	2,781	5,792	8,573		
Nutritional Assessments Conducted	1,846	2,000	1,858	93%	101%	0	654	654	2,000	33%
<b>Transportation</b>						September				
Total Ride Count	99,104	90,000	116,017	129%	117%	7,967	24,766	32,733	100,000	33%
Paratransit/Dial-A-Ride Count	31,645	30,000	26,784	89%	85%	1,911	4,213	6,124	30,000	20%
City, Commuter and Other Ride Count	67,459	60,000	89,233	149%	132%	6,056	20,553	26,609	70,000	38%
Eagle Transit Outreach/Special Events	42	15	31	207%	74%	5	11	16	25	64%
<b>Information and Referral/Assistance</b>						September				
Outreach, Information, Referral Contacts	19,429	18,000	26,014	145%	134%	1,624	3,335	4,959	18,000	28%
Outreach/Education/Media Efforts	116	120	129	108%	111%	10	18	28	120	23%
<b>Independent Living</b>			66%			September				12%
Homemaker Units of Service	2,005	1,324	1,433	108%	71%	122	264	386	2,000	19%
Escorted Transportation Units of Service	2,314	1,391	886	64%	38%	73	144	217	2,174	10%
Respite Units of Service	2,079	3,250	1,793	55%	86%	92	197	289	2,857	10%
Community Support/Senior Companion Units of Service	1,310	1,176	508	43%	39%	40	56	96	1,471	7%
Personal Care Units of Service	231	65	146	225%	63%	11	20	31	174	18%
<b>Benefits Counseling</b>						September				
Benefits Counseling Hours of Service	502	450	1,193	265%	238%	20	35	55	500	11%
<b>Ombudsman</b>						September				
Ombudsman consults/cases opened	1,250	1,100	1,116	101%	89%	93	111	204	1,000	20%